



The Global Quest for Talent

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Oslo October 2009



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This morning:

- ***Introduction to the global education market***
- ***A short course on marketing***
- ***What might the market be telling us?***
- ***Check what the students might want***
- ***Research students***
- ***Attempt to answer any questions***

HE - the changing world environment

- ***Developing and Middle Income Countries: Governments unable to meet growing demand for HE places***
- ***Europe and North America – limits to growth***
- ***Global economic crisis – cuts to HE budgets***
- ***Growth of the for profit private sector***
- ***More countries pricing HE programmes to students at full costs***
- ***Growth in new approaches to delivery: TNE will evolve, including on-line delivery***

what might be changing in international education?

- *more competitors, both countries and institutions*
- *increasingly different (higher) expectations of students*
- *different approaches to funding and student support;*
- *partnerships will grow – research and teaching*
- *Obama halo effect: re-invigorated US;*

Impact of economic crisis - messages from US

The intersection of the need for cash to pay the bills and save jobs, the hiking of fees for higher fee-paying foreign students, and the sales and marketing attempts across the globe to be successful, is going to send the recruitment game into an unprecedented, intense, and even desperate competition for the international student.

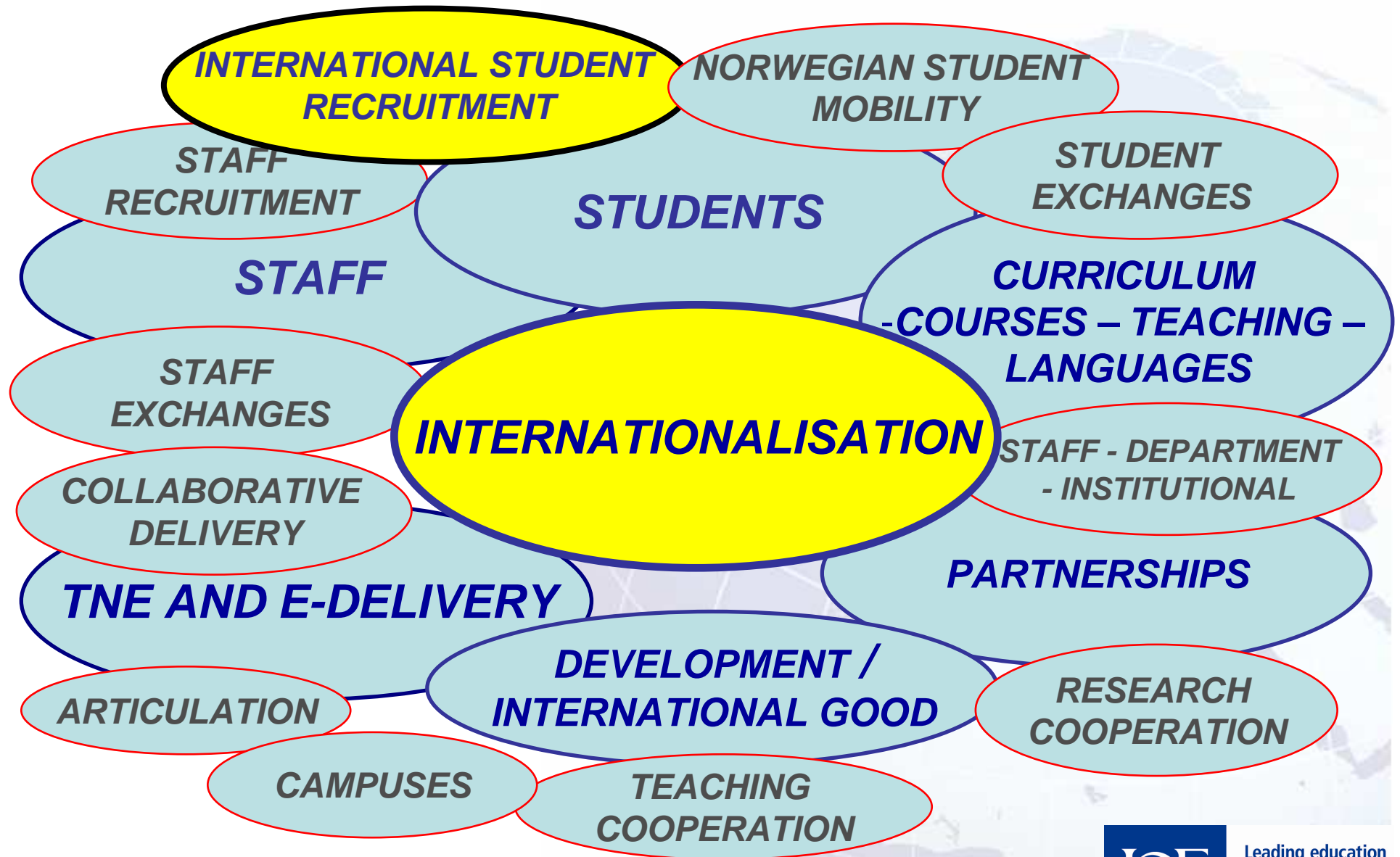
New York Times, 16 March 2009



International education or internationalisation?

Latter is increasingly important as institutions seek to spread internationalisation to all activities

What activities might constitute internationalisation?



Internationalisation and Norway – what do you prioritise?

- ***What activities?***
 - ***Grow Norwegian student mobility***
 - ***Recruit research staff***
 - ***Support development assistance agenda***
 - ***Recruit international students***
- ***What countries?***
- ***Who are your competitors?***
(and how will you differentiate from them?)



***The global student market:
A reminder of its size***

***Growth in all markets -
(BUT can it continue?)***

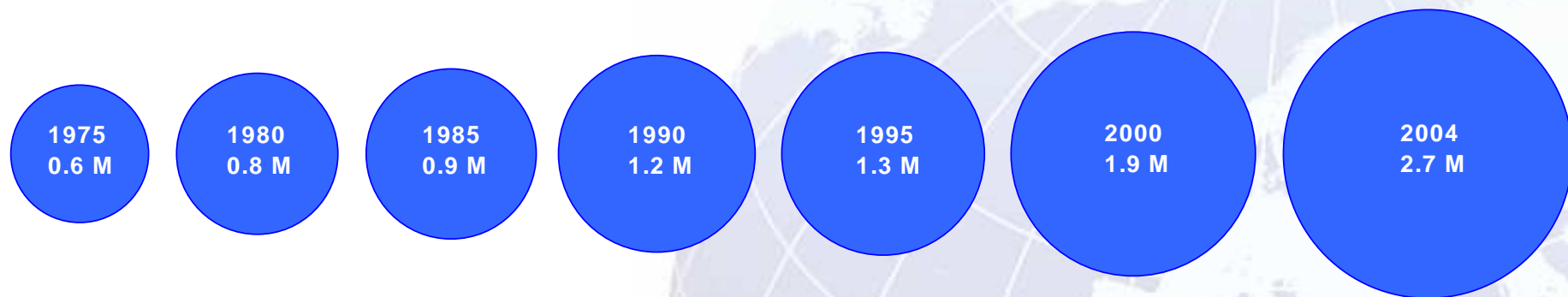
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International student mobility: trends since 1975

Chart Box 3.1.
Growth in internationalisation of tertiary education (1975-2004)



➤ **3 million students estimated to be educated outside their home countries, a 50% increase since 2000.**

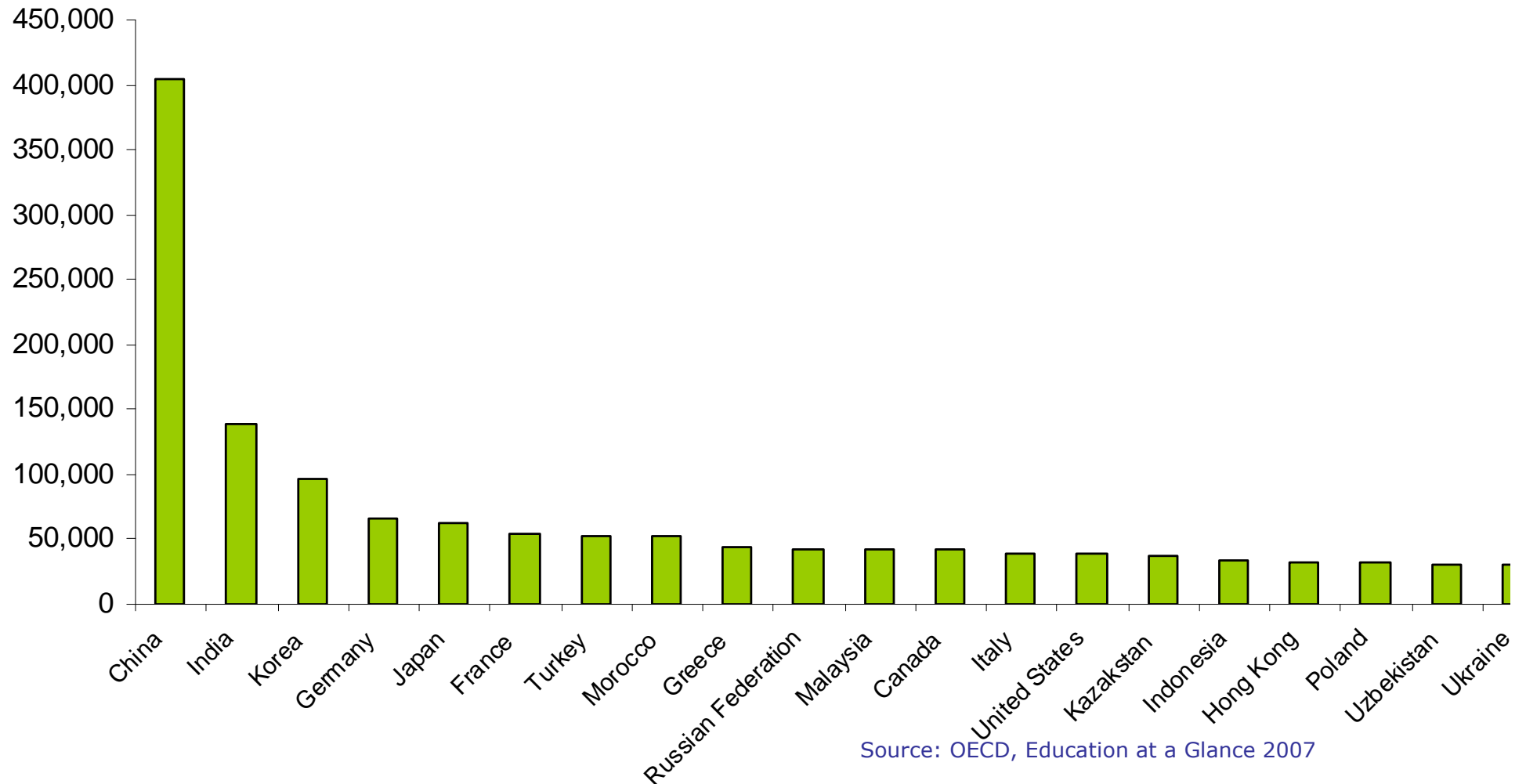
➤ **By 2025 more than 8 million students will be educated internationally**

International students in main destination countries (05-06)

Destination Country	Numbers
USA	590,158
UK	356,080
Germany	259,799
France	236,518
Australia	207,264
Japan	125,917
Russia	90,450
China	77,700
Canada	71,650
Norway	14,300
Source: UNESCO and HESA	

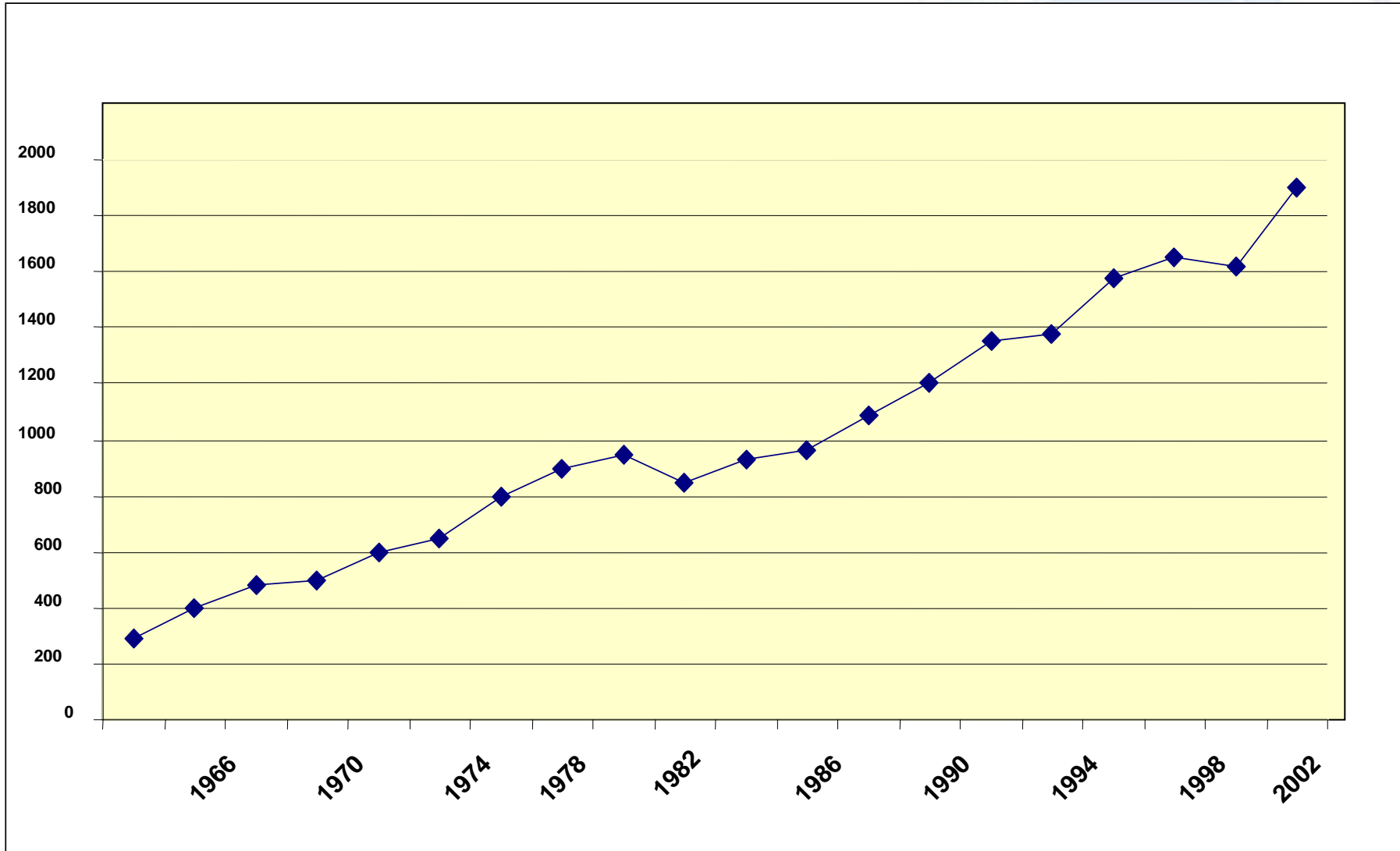
Where Do They Come From? Top 20 Countries of Origin

Top 20 Countries of Origin



Source: OECD, Education at a Glance 2007

Overall Global Trend in HE Students Studying Outside their Home Country (OECD data)



Australia

March 2009:

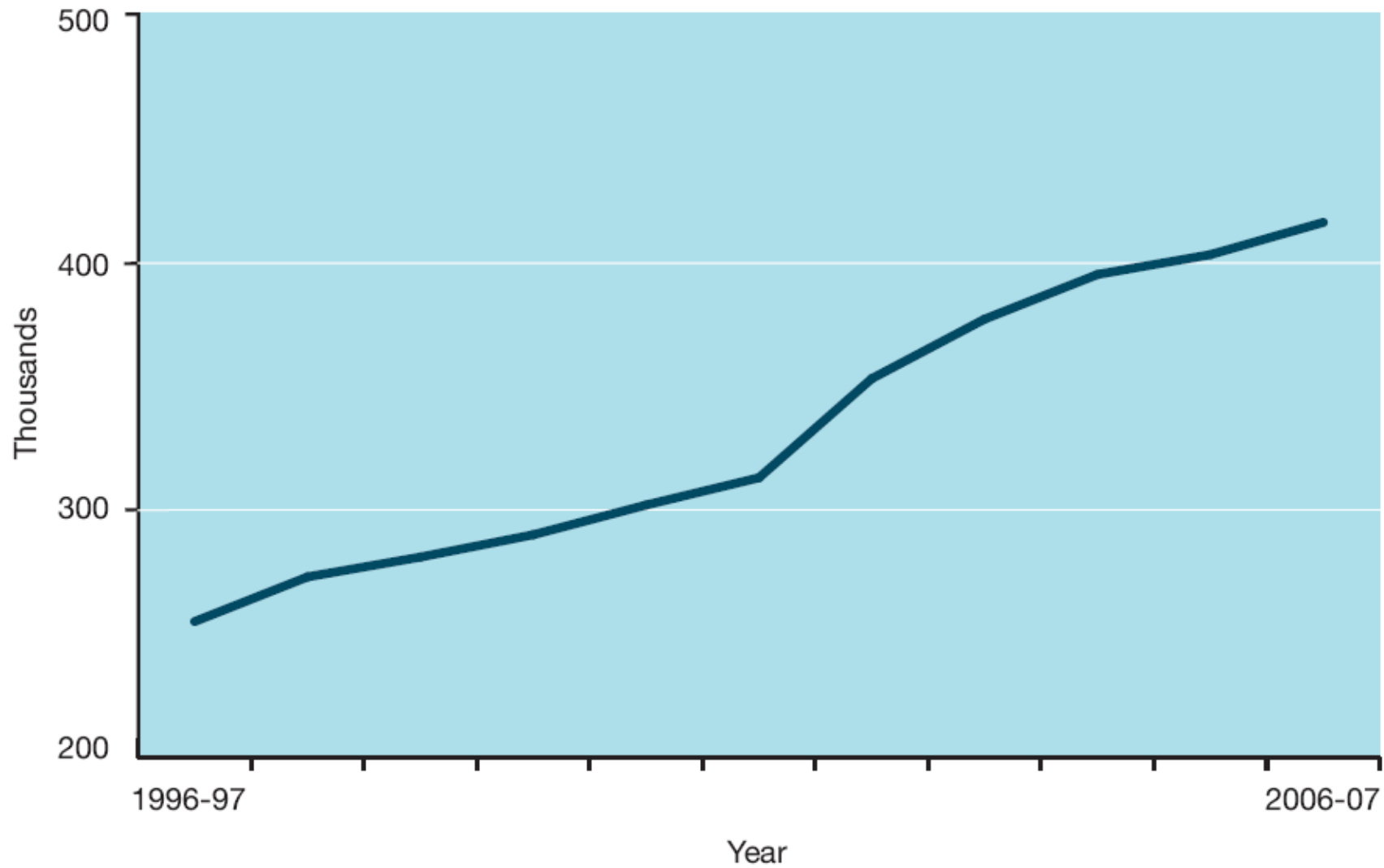
147,251 all commencements up 18%

HE up 13.2%

Increases (all students):

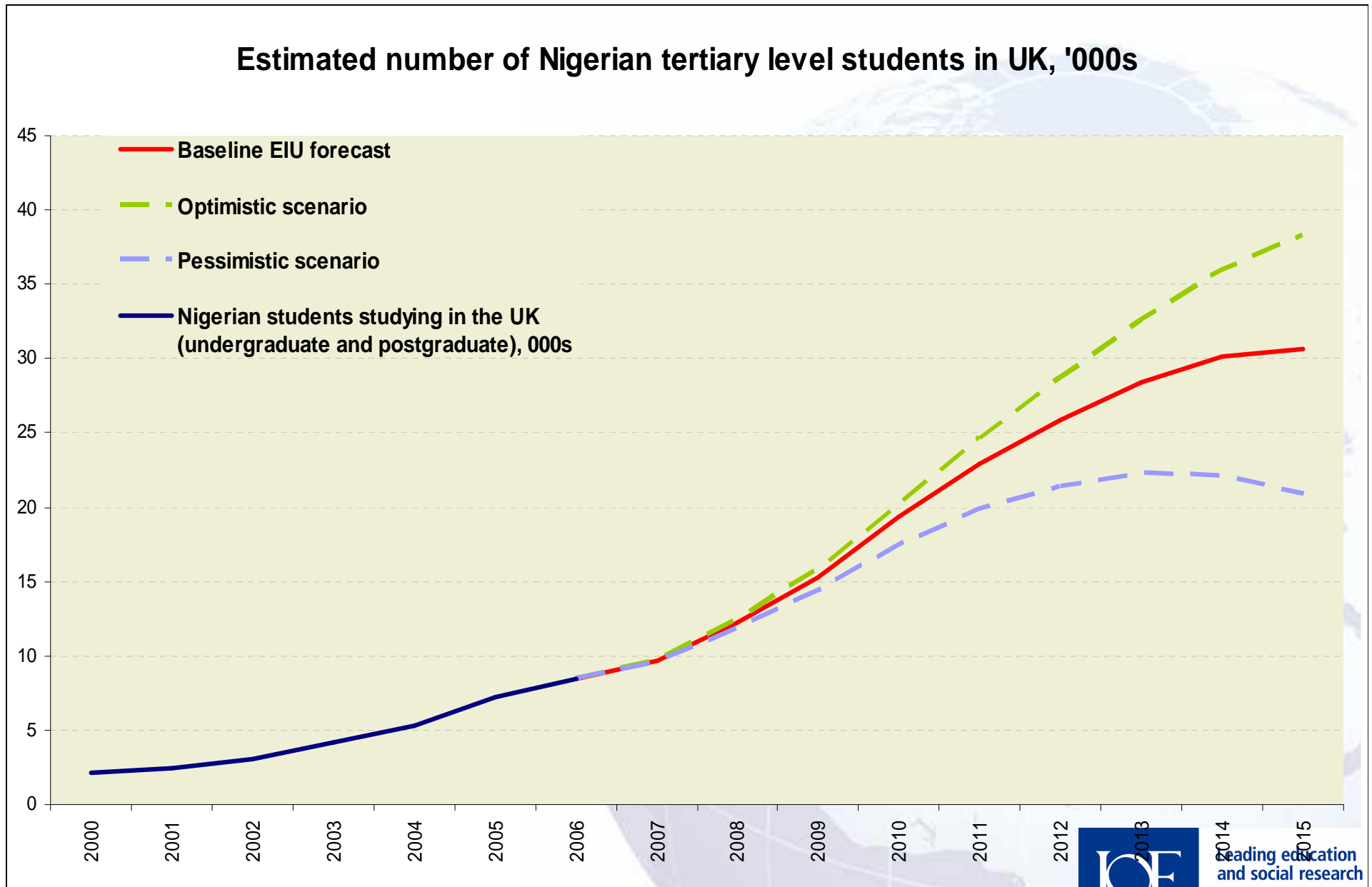
China	19.6%
India	38.9%
Korea	4.2%
Malaysia	10.8%
Nepal	62.9%
Thailand	17.0%
Vietnam	62.1%

Growth in number of international students in UK



Source: courtesy British Council

British Council – Economist Intelligence Unit Research



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A very brief introduction to marketing

Marketing is

.... understanding your customers

***.... finding ways to provide services
which satisfy customer's demand***

***.... and in a competitive environment to do
this better than your competitor!***

International student marketing – the Big ‘P’s

- *Product – which programmes?*
- *Price*
- *Place – where is your market?*
- *Promotion – how will you communicate?*
- *Positioning*

DIFFERENTIATE from your competitors

AND who are your competitors?

- ***Australia?***
- ***UK?***
- ***Sweden?***
- ***University of Lund?***
- ***University of Bergen?***

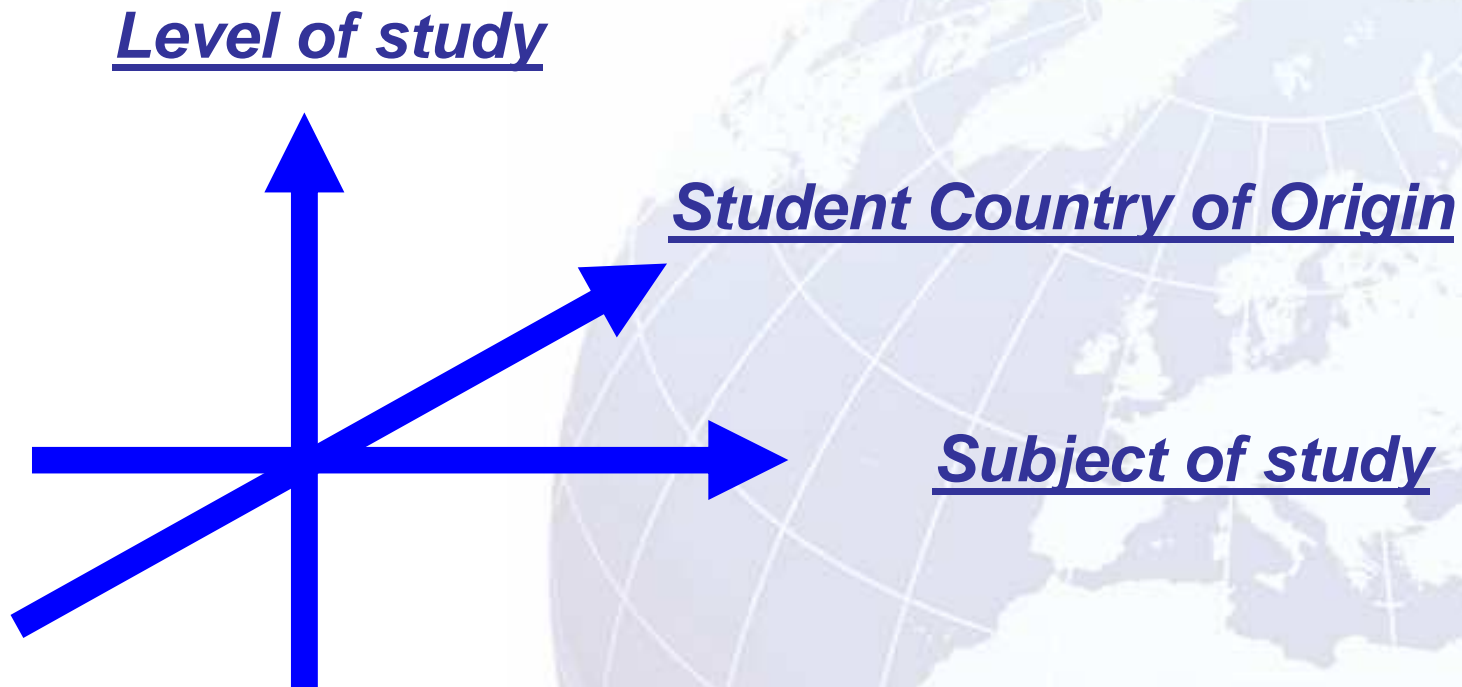
Differentiation from your competitors is vital

BUT – how?

- Quality***
- Big name faculty***
- Location***
- Great environment***
- Employability of qualifications***
- Social life***

or 329th in Times Higher Ranking?

International Students: The Education Marketing Mix



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<i>Norway</i>	
<i>All</i>	14,297
<i>Sweden</i>	1179
<i>Denmark</i>	863
<i>Russia</i>	772
<i>China</i>	630
<i>Germany</i>	579
<i>UK</i>	345
<i>USA</i>	344
<i>Finland</i>	291
<i>Iran</i>	274
<i>Ethiopia</i>	252
<i>Iceland</i>	245
<i>Iraq</i>	219
<i>Bosnia</i>	199
<i>Pakistan</i>	174
<i>Poland</i>	172
<i>Netherld</i>	163

<i>Sweden</i>	
<i>All</i>	19966
<i>Germany</i>	1856
<i>France</i>	1180
<i>Spain</i>	792
<i>Finland</i>	557
<i>USA</i>	529
<i>Netherld</i>	485
<i>Italy</i>	401
<i>Austria</i>	358
<i>Poland</i>	347
<i>UK</i>	306
<i>Australia</i>	246
<i>Canada</i>	238
<i>Czech</i>	186
<i>Belgium</i>	183
<i>Denmark</i>	170
<i>Switzer</i>	161
<i>China</i>	155

<i>Denmark</i>	
<i>All</i>	10,251
<i>Norway</i>	1529
<i>UK</i>	1394
<i>Germany</i>	872
<i>Iceland</i>	804
<i>China</i>	793
<i>Sweden</i>	636
<i>USA</i>	566
<i>France</i>	448
<i>Spain</i>	286
<i>Australia</i>	222
<i>Belgium</i>	150
<i>Switzerld</i>	148
<i>Italy</i>	130
<i>Poland</i>	122
<i>Ireland</i>	116
<i>Netherld</i>	111

<i>New Zealand</i>	
<i>All</i>	40,774
<i>China</i>	23260
<i>Australia</i>	2742
<i>USA</i>	2077
<i>India</i>	1563
<i>Malaysia</i>	1190
<i>Korea</i>	1189
<i>Germany</i>	1075
<i>Japan</i>	916
<i>Vietnam</i>	492
<i>Thailand</i>	453
<i>Fiji</i>	450
<i>Hong Kong</i>	436
<i>Canada</i>	431
<i>UK</i>	406
<i>Indonesia</i>	350
<i>France</i>	266

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Subject areas: international postgraduate students in UK HE

Subject area	Totals	PGR (doctorate)	PGT (Masters)
Total	368015	50365	131915
Business & mgmt	89915	3495	45940
Engineering & tech	44535	8780	14365
Social studies	32080	5855	11265
Languages	25535	3300	4870
Computer science	20825	3080	9525
Medicine and related	29485	4705	8005
Creative arts & design	19060	1205	5185
Law	17630	1410	7320

Revenue from international students in selection UK universities

Institution	International students (total)	Intl student revenue (€million)	University total revenue (€million)	Overseas as % of total
<u>UK HE institutions</u>				
Manchester	7,300	€71M	796,700	8.9%
LSE	5,700	€68M	210,900	32.3%
Nottingham	6,500	€63M	478,000	13.2%
Cambridge	5,400	€28M	1,197,800	3.2%
Westminster	5,600	€26M	182,900	14.3%

The new competition – some alternative destinations (UNESCO 2005)

<u>MALAYSIA</u>	
Country of origin	Numbers
Total	±50,000
Indonesia	7,541
China	7,310
Bangladesh	6,517
Pakistan	1,956
Nigeria	1,813
Iran	1,784
Yemen	1,552
India	1,372
Thailand	944
Sudan	911
Maldives	883
Somalia	571
South Korea	565

<u>UKRAINE</u>	
Total	23259
China	4113
Russia	3673
Syria	1549
Jordan	1352
Malaysia	1338
Iran	1230
Moldova	1097
India	957
Turkmenistan	784
Morocco	679
Viet Nam	666
Tunisia	585
Lebanon	536
Turkey	269



International student recruitment:

- ***What motivates countries and institutions to be involved?***
- ***What motivates students to seek international study?***



Norway and international student recruitment:

- ***What is your motivation to recruit in your institution?***
- ***What are the incentives for staff?***
- ***How much are you willing to invest in marketing?***



No such thing as a free lunch!

Does Norway lose out by saying education is 'free'?

All students cost the same it is just that they derive their funds that differs!

Better marketing messages



TURNING to the STUDENTS

***Towards an understanding of students:
Who are they and what do they want?***

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What might inform a student's choice of international destination?

Main influences

- ***Word of mouth – friends, alumni, other students, blogs, chat rooms etc***
- ***Parents***
- ***Websites (institutional, national, companies)***
- ***Prospectus***
- ***Teacher/tutor***
- ***Visits to an institution***
- ***Staff at presentation***
- ***Exhibitions***
- ***Agents***
- ***League tables***

A mixture of all – but in differing priorities

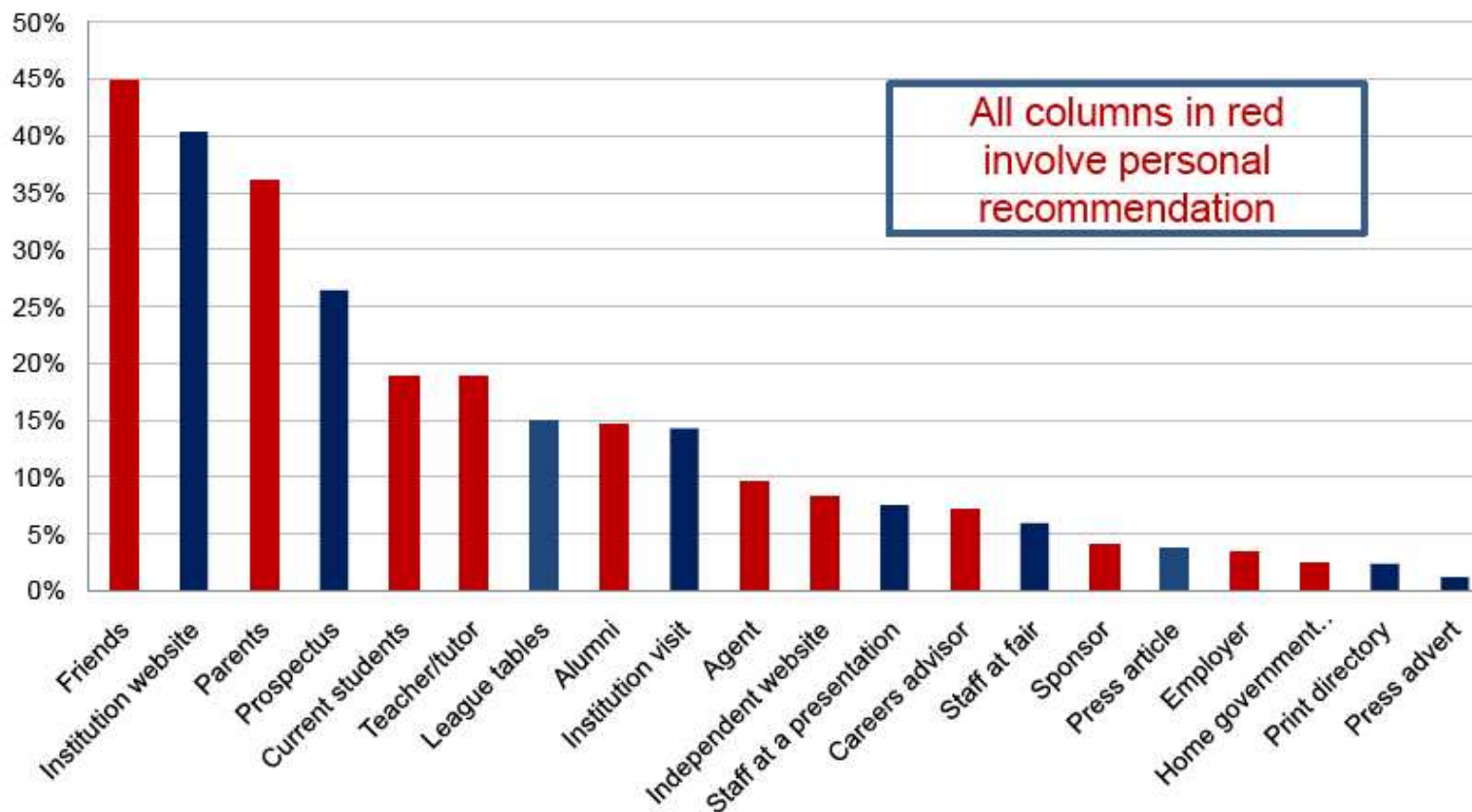
Variations according to country and levels/subjects

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Which of the following helped you to choose?



All columns in red involve personal recommendation

International students: how do they fund their studies?

International students in UK – major sources of funding

- *Student's own private funding:* **70%**
- *Overseas government or employer:* **9%**
- *UK government* **10%**
- *UK institution fee waiver* **6%**
- *Other* **5%**



Does the cost of study matter?

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Comparison of total costs to obtain a Master's degree in computing/IT for non-EU students

<i>University</i>	<i>Duration (yrs)</i>	<i>Total fees</i>	<i>Total living costs</i>	<i>Total (fees + living)</i>
Melbourne	2	€33,341	€20,592	€53,933
NYU	1.5	€33,188	€18,000	€51,188
Nottingham	1	€15,290	€11,988	€27,278
Coventry	1	€9,966	€11,988	€21,954
Groningen	2	€18,600	€19,200	€37,800
Tilburg	1	€10,296	€9,600	€19,896
Copenhagen	2	€29,333	€24,322	€53,655
Auckland (NZ)	1	€12,188	€8,583	€20,771
A University in Norway	2	0	€24,000	€24,000

Websites and students' needs – are you international 'student friendly'?

Some key requirements for content:

Are my qualifications likely to be acceptable?

• *How can I get the necessary visa?*

• *What scholarships (and fees!)*

• *Programme*

– *Content*

– *Staff*

Other possibilities:

• *Alumni stories (in my country)*

• *Pages in local languages*



How will you communicate Norwegian opportunities?

- ***Alumni***
- ***Agents?***
- ***Advertise on websites, other places***
- ***Events***
- ***Staff promotional visits***
- ***Links and partnerships***

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Latest news : Meet the University of Bristol at the QS World Grad School Tour 2009....Click here to find out more about Bris_

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***Skilled manpower recruitment:
Doctoral researchers***

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Global market for doctoral researchers

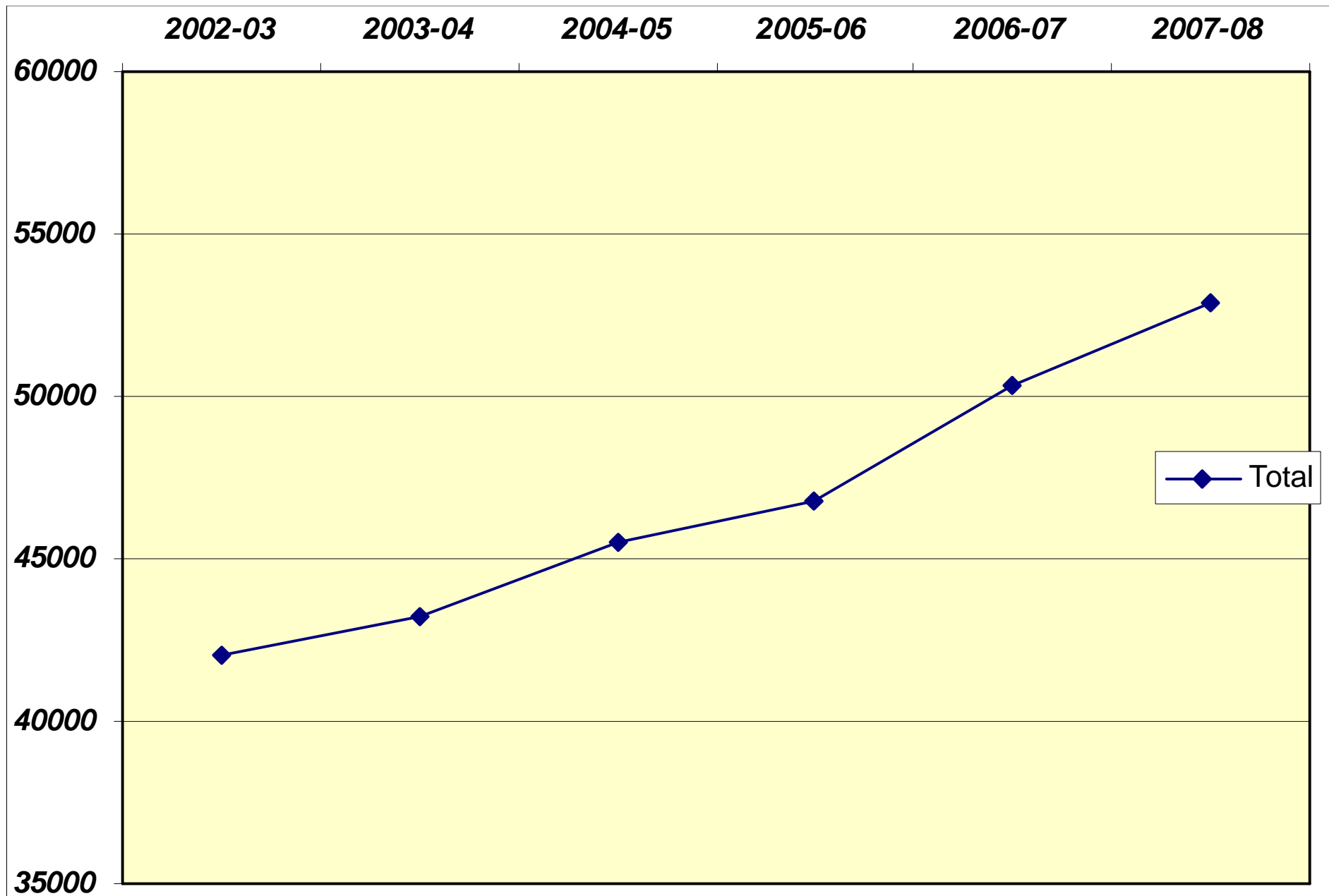
- ***Total market size: 250,000 (?) globally mobile***
- ***USA and UK dominate ±130,000***
- ***Germany, France next***
- ***Others: Australia, New Zealand***
- ***Europe: Netherlands, Sweden Denmark - Norway?***

International PGR students in UK HE according to main source countries (2007-08)

Country	Nos	% share
Total	52900	100.0
China	5175	9.8
USA	3568	6.7
Greece	2894	5.5
Germany	2790	5.3
Malaysia	2211	4.2
Italy	2037	3.9
India	2030	3.8
France	1388	2.6
Canada	1324	2.5
Taiwan	1246	2.4
Ireland	1243	2.3
Thailand	1211	2.3
Pakistan	1202	2.3
Saudi Arabia	1090	2.1

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Trend in total numbers of international PGR students in UK HE



PGR students in UK HE according to main subject areas (2007-08)

	<i>All intl</i>	<i>Intl as % of all</i>
<i>Totals all</i>	52900	43.6
Medicine and related	5364	29.8
Eng and tech	10361	59.0
Humanities	7153	41.2
Biosciences and related	5060	33.1
Physical sciences	5047	37.1
Social studies	6143	53.6
Maths and computing	4653	54.2
Education	2570	37.9
Business & admin studies	3731	59.1
Creative arts & design	1325	34.0
Law	1449	60.0

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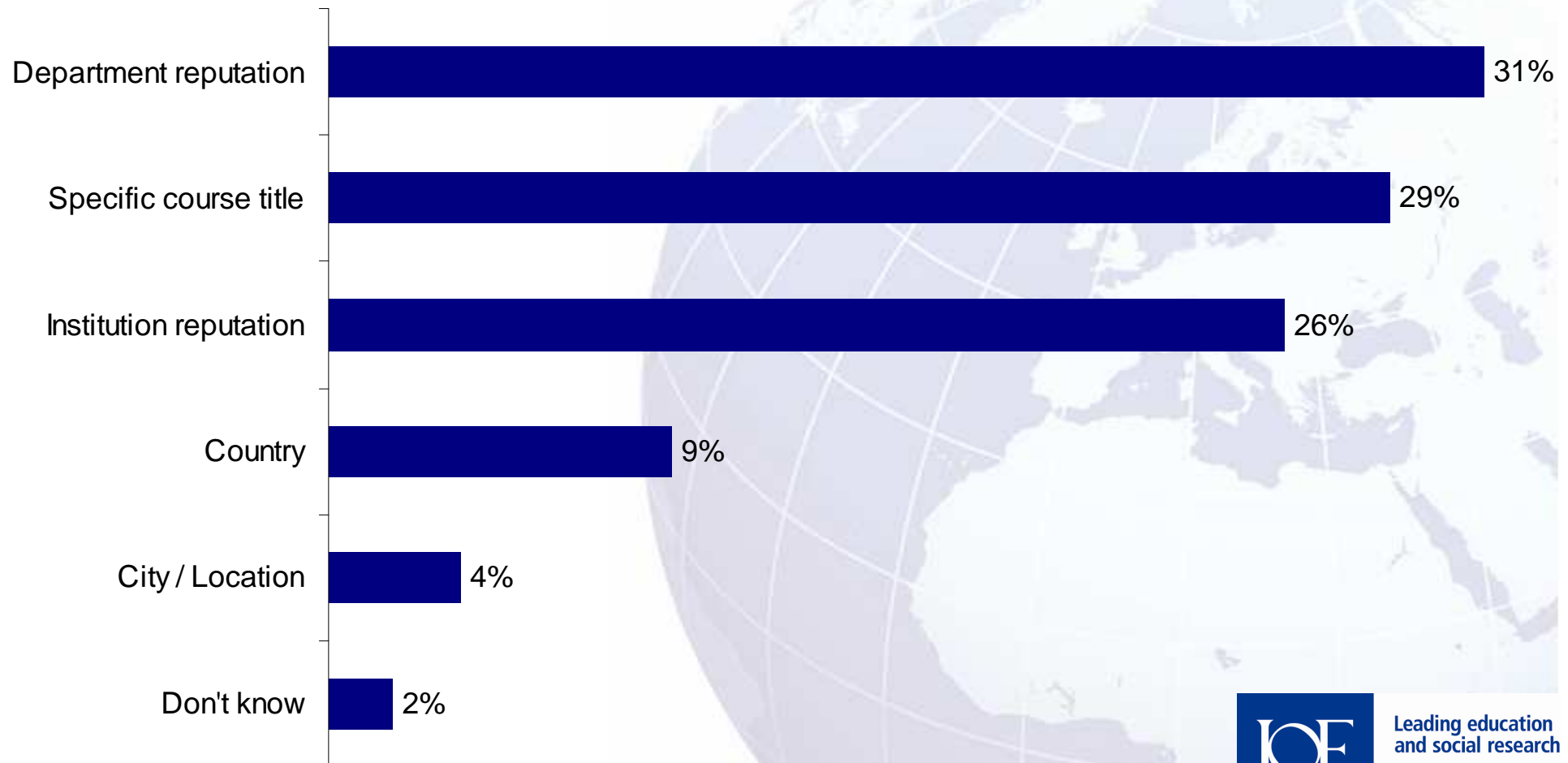
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Lead countries according to subject area

- ***Engineering and technology:***
China, Malaysia, Greece, India, Italy
- ***Physical sciences***
China, France, Germany, Italy, Spain
- ***Biosciences:***
Greece, China, Germany, India, USA
- ***Social sciences***
USA, Germany, China, Italy, Greece
- ***Humanities***
USA, Canada, Germany, Greece, Korea

turning to the students!

Major factors influencing the decision of an international doctoral student

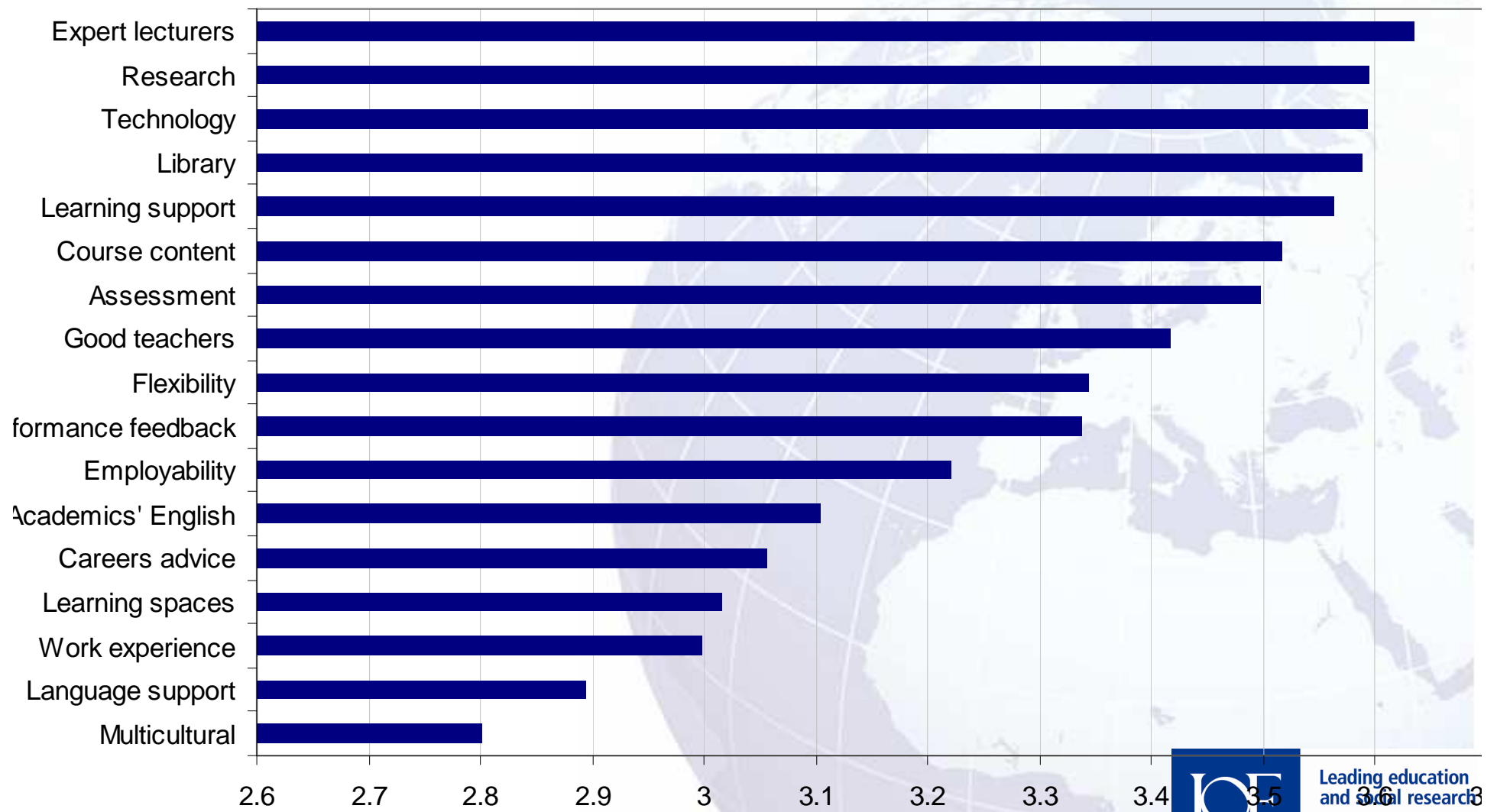


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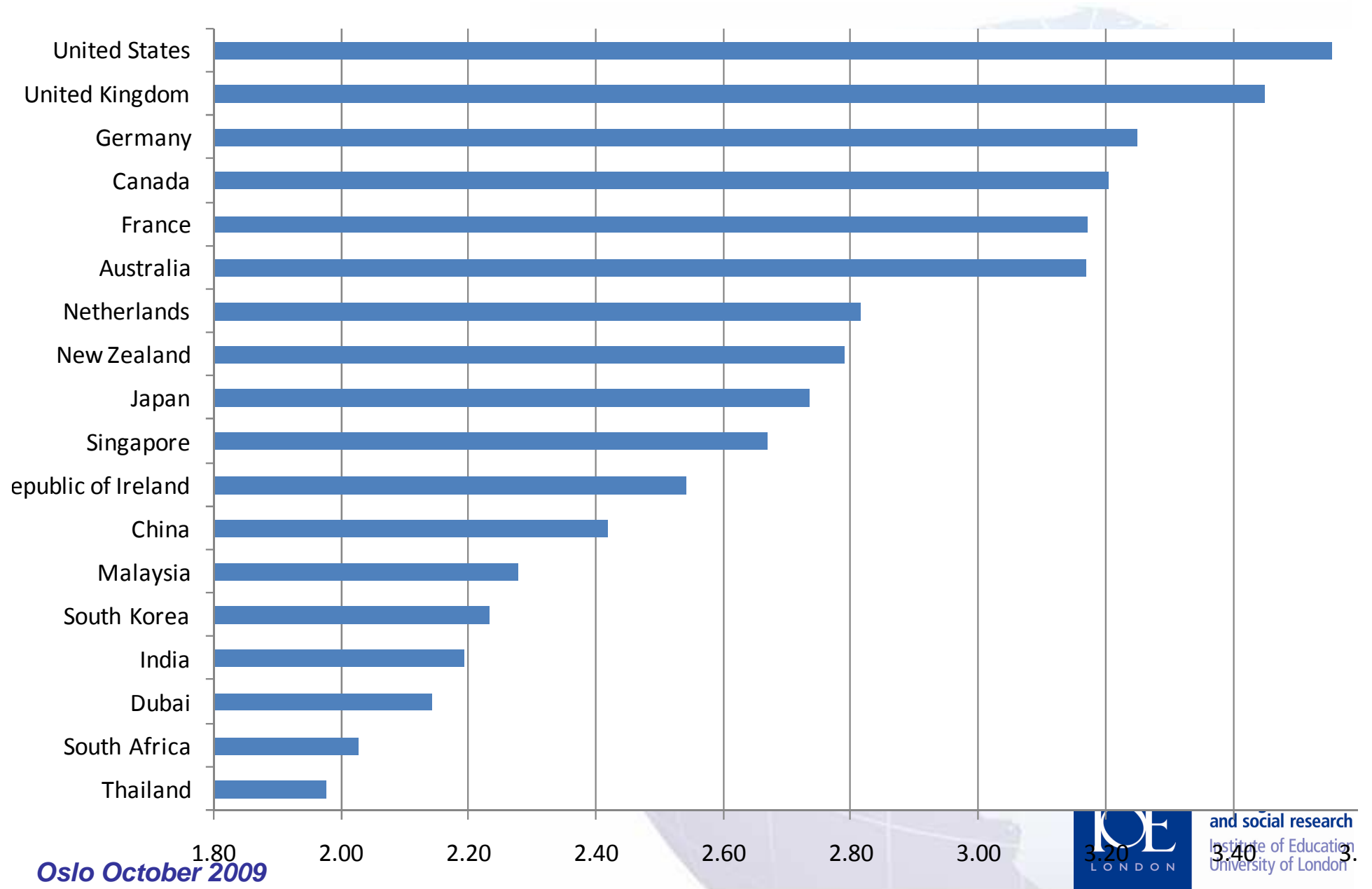
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Relative importance ratings for key factors associated with learning experience.



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Relative attractiveness of country destinations favoured by international PGR students



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International PGR students in UK - Who pays?

Non-UK sources

- *Students own personal funds:* 48%
- *Student scholarship from home:* 15%
- *International scholarships* 0.5%

UK sources

- *Fee discounts from UK institutions:* 26.5%
- *UK scholarships and foundations* 3.5%

Augmented by part time employment

What is driving global demand?

- ***Fast growth HE provision in lower and middle income countries with lack of research infrastructure for staff development***
- ***Increasing investment in research eg China***
- ***Increasingly competitive international employment market***
- ***Access international employment***

some concerns for doctoral recruitment:

- ***What does the Norwegian doctorate mean, pathways and supervisor support?***
- ***What advice on application - how to access appropriate research programmes/departments/supervisors***
- ***What information on scholarships and funding***
- ***Immigration and access to employment***
- ***Institutional and national websites – are they doctoral researcher friendly***

The Challenges?

- ***Growth of competition***
 - *The existing big players*
 - *The new entrants*
 - *Private sector*
- ***Demographic changes***
 - *Europe/North America/Japan*
 - *China - India*
- ***Maintaining quality with funding constraints***
- ***Understanding students needs (research?)***

So where are and what might be the future opportunities?

- ***International student recruitment will continue to grow***
- ***Opportunities to attract doctoral/ research students increase***
- ***International partnerships – research, teaching, staff and students exchanges***
- ***Which countries and why?***
- ***Doctoral researchers – do some deals in select countries***

Towards growing Norwegian international student recruitment?

- ***Understand motivations and incentives for Norwegian institutions and staff***
- ***Invest in market research***
 - ***Overall picture***
 - ***Students***
- ***Prioritise countries and subject areas***
- ***Exploit synergies***
- ***Grow partnerships***
- ***Communications strategy for priority countries – remember nothing is ‘free’!***
- ***Encourage involvement of faculty***

What might you do now in your institution?

- *Learn from your current international students*
- *Review your website and promotion materials*
 - *Does it explain funding arrangements*
 - *Is there a clear statement of subjects available*
 - *Is there clear statement of application process (and time scale!)*
- *Grow niche markets*
- *Use some international websites*



Many thanks!

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